


Welcome to the RF Pension Portal

We're dedicated to providing our members and clients with a seamless and secure online experience. As a valued part of our pension community, you can effortlessly access comprehensive information about your membership, track your contributions, and manage your account with ease.

 Start exploring your membership today



Sign In

User Name or Email address*

Password*

[Forgot password?](#)

[Did you receive a welcome email? Sign Up](#)

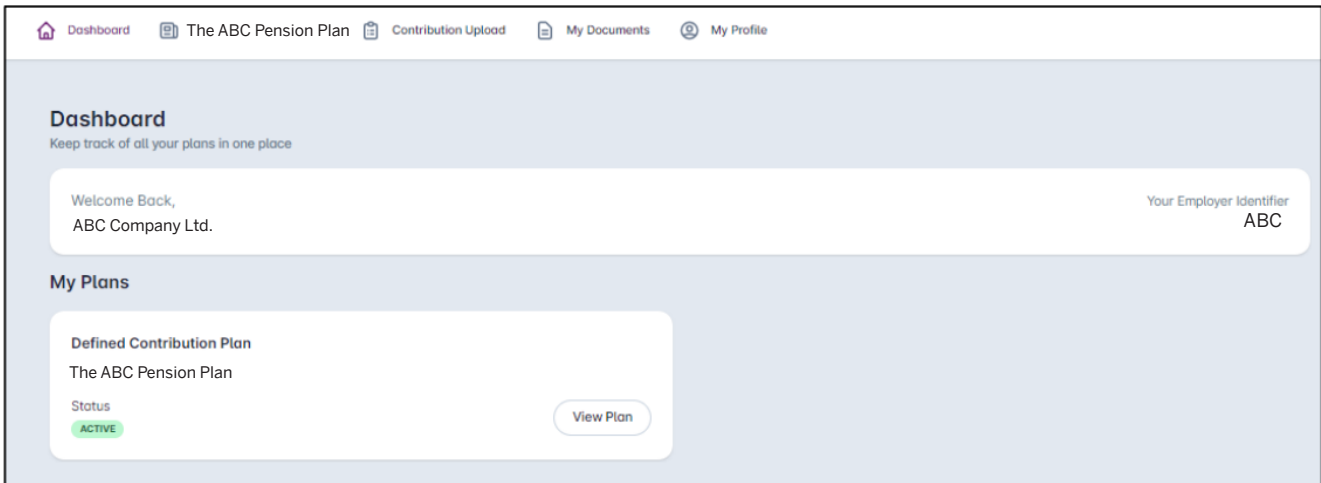
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Employers have access to all plans, employer values and their employees that are members of the pension plan. Employers can change member information and view member documents.

DASHBOARD

The Employer Dashboard contains the name of the employer, employer identifier and pension plans that the employer is part of.




Note: Selecting the View Plan button will navigate to the Pension Plan page.

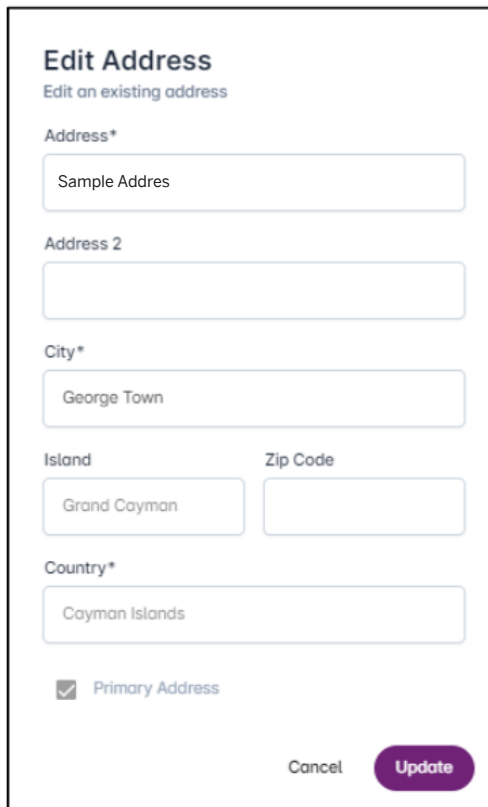
MY PROFILE

The Employer Profile page displays the employer identifier, name, address and contact information.

PROFILE TAB

Updating an Address

1. Within the address section of the page, select the edit button  to open the Edit Address dialog box.
2. Enter the updated address information.



Edit Address
Edit an existing address

Address*
Sample Address

Address 2

City*
George Town

Island
Grand Cayman

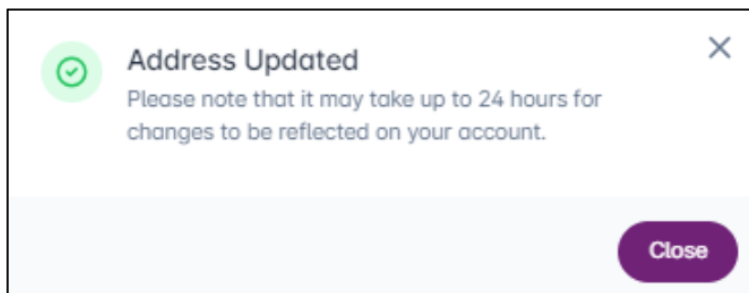
Zip Code

Country*
Cayman Islands

Primary Address

Cancel Update

3. Press the Update button to save the information.



Note: Address changes may take up to 24 hours to reflect in the pension portal.

Adding an Additional Address

1. Click the **+ Add Address** button to add another address.

Address

+ Add Address

📍 Test Lane

📍 123 Test, Canada

📍 Canada

2. Enter the new address information, then click Add.

Add Address

Add a new address

Address*

Address 2

City*

State Zip Code

Country*

Primary Address


Cancel

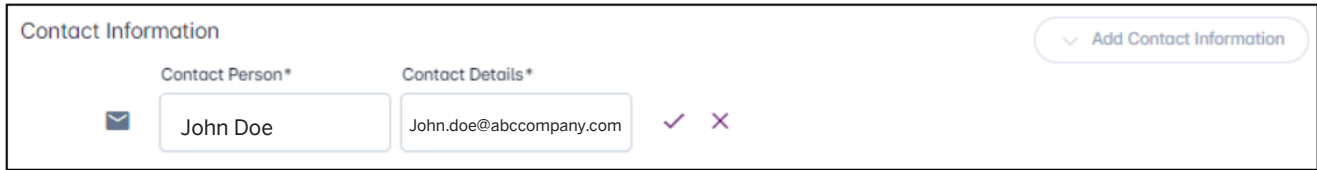
Note: Address changes may take up to 24 hours to reflect in the pension portal.

Deleting an Address

Addresses can be deleted by clicking the delete button .

Updating Contact Information

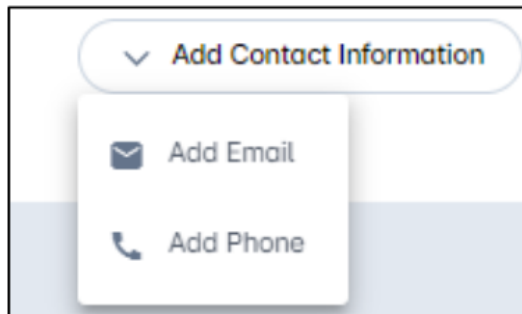
1. Within the contact information section of the page, select the edit button  to update the contact information.



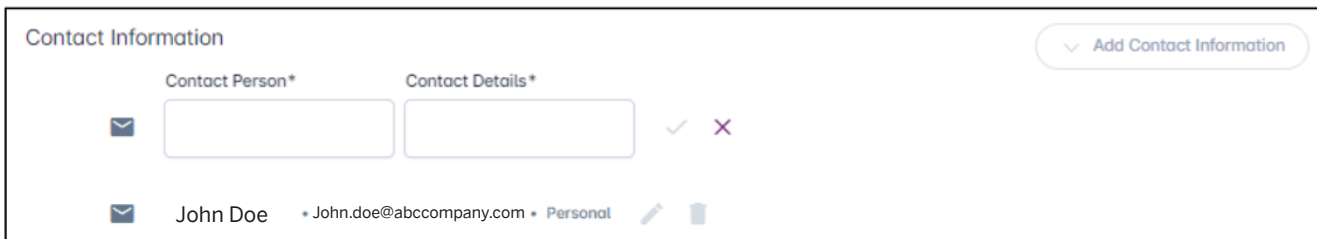
2. Input the updated information.
3. Press the checkmark to confirm the update.

Adding Contact Information

1. In the Address section of the page, select the Add Contact Information drop-down.



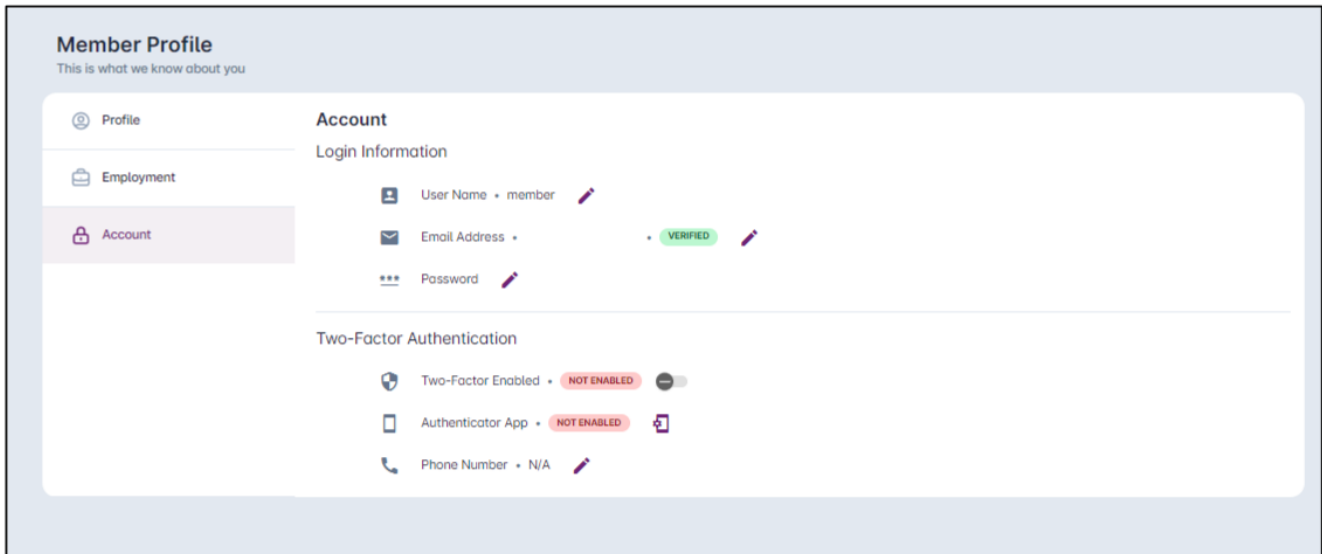
2. Enter the new contact information in the corresponding fields (email or phone).



3. Press the checkmark to confirm the update.

ACCOUNT TAB

The Account tab of the Member Profile page contains the web login information. This tab also includes functions to update the username, email address, password, and two-factor authentication.



Updating Username

To update the username, select the edit button  beside username and enter the updated information.

A form titled 'Update User Name' with the subtitle 'Update your user name'. It contains two input fields: 'New User Name*' with the text 'USERNAME2' and 'Confirm Password*' with masked characters '*****'. At the bottom right, there are two buttons: 'Cancel' and 'Update'.

Updating Email Address

To update the email address, select the edit button  beside the email address and enter the updated information.

Update Email Address

Update your account email address

New Email*

Confirm New Email*

Confirm Password*

[Cancel](#) [Update](#)

Update Password

To update the email address, select the edit button  beside the email address and enter the updated information.

Note: Passwords must have the following features:

- At least 8 characters
- At least one alphanumeric character
- At least one non-alphanumeric character
- At least one digit (0-9)
- At least one upper case letter

Update Password

Update the password for your account

Current Password*

New Password*

Confirm New Password*

Passwords must match

Cancel Update

Dashboard ABC PENSION PLAN Contribution Upload My Documents My Profile

Employer Profile

This is what we know about your organization

- Profile
- Account

Profile

Organization Information

- ABC
- ABC Company

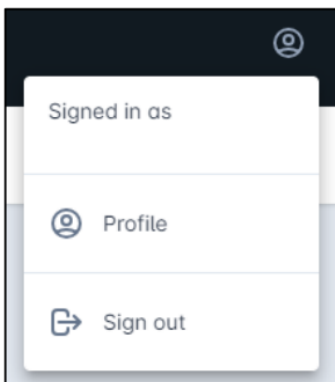
Address + Add Address

- 123 Lane • Primary

Contact Information ∨ Add Contact Information

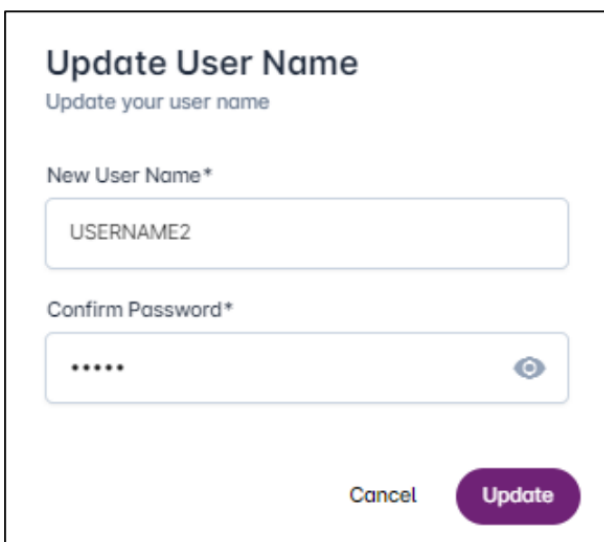
- Janedoetest@email.com • Administration
- info@test@email.com • Business
- 000-000-0000 • Business

The Employer Profile page can also be accessed by clicking on the  icon in the top right-hand corner on the web page. Note: this is also where users can sign out of the pension portal.



Updating Account Settings

To update the username, select the edit button  beside the username and enter the updated information.

A screenshot of a form titled "Update User Name" with the subtitle "Update your user name". The form contains two input fields: "New User Name*" with the text "USERNAME2" and "Confirm Password*" with five asterisks. There is a visibility toggle icon (an eye) to the right of the password field. At the bottom right, there are two buttons: "Cancel" and "Update".

To update the email address, select the edit button  beside the email address and enter the updated information.

Update Email Address
Update your account email address

New Email*

test@email.com

Confirm New Email*

test@email.com

Confirm Password*

.....

Cancel Update

To update the password, select the edit button  beside the password and enter the updated information.

Update Password
Update the password for your account

Current Password*

.....

New Password*

.....

Confirm New Password*

.....

Passwords must match

Cancel Update

Two Factor Authentication

Two Factor Authentication can be enabled by clicking the switch button and then following the instructions in the on-screen prompts.

Note: Two-factor authentication cannot be disabled.

PLAN

The employer pension plan page provides the employer with plan information, plan details such as members, fund allocations and documents.

The screenshot displays the 'ABC Pension Plan' page. At the top, there is a navigation bar with links for 'Dashboard', 'ABC Pension Plan', 'Contribution Upload', 'My Documents', and 'My Profile'. Below the navigation bar, the page title 'ABC Pension Plan' is followed by the subtitle 'Defined Contribution Plan'. The main content area is divided into two sections: 'Plan Information' and 'Plan Details'. The 'Plan Information' section contains a table with the following data:

Plan Name	Status	Status Date	Type
ABC Pension Plan	ACTIVE	Jan 1, 1950	RPP
Investment Manager	Trustee	Sponsor	Administrator
ABC Pension Plan	N/A	XYZ Company	RF Bank & Trust

The 'Plan Details' section has three tabs: 'Members', 'Fund Allocation', and 'Documents'. The 'Members' tab is selected, showing a search bar and a filter for 'Active' status. Below the search bar is a table of members:

Member ID	Name ↑	Status	Birth Date
961-000-003	Jane Doe	ACTIVE	Nov 23, 1963
961-000-010	John Doe	ACTIVE	Feb 13, 1986
961-000-004	Jan Doe	ACTIVE	Mar 31, 1974
962-000-002	Sam Doe	ACTIVE	Nov 23, 1963
961-000-002		ACTIVE	Aug 4, 1975

At the bottom of the members table, there is a pagination control showing 'Items per page: 10' and '1 - 10 of 13' with navigation arrows.

Plan Information

The Plan Information card displays the pension plan information such as plan name, investment manager, status date, plan type, plan sponsor and administrator.

ABC Pension Plan			
Defined Contribution Plan			
Plan Information			
Plan Name	Status	Status Date	Type
ABC Pension Plan	ACTIVE	Jan 1, 1950	RPP
Investment Manager	Trustee	Sponsor	Administrator
ABC Pension Plan	N/A	XYZ Company	RF Bank & Trust

Plan Details

The Plan Details section includes information about members, fund allocations and documentation.

Members

The Members tab displays the Member ID, Name, Status, and Date of Birth for all of the employees within the Employer's plan.

Employers can search for employees in this section by name, ID number or status.

Members			
Search by Member ID, Name or Status			
All Statuses Active			
Member ID	Name ↑	Status	Birth Date
961-000-003	Jane Doe	ACTIVE	Nov 23, 1963
961-000-010	John Doe	ACTIVE	Feb 13, 1986
961-000-004	Jan Doe	ACTIVE	Mar 31, 1974
962-000-002	Sam Doe	ACTIVE	Nov 23, 1963

Items per page: 10 1 - 10 of 13 < >

Fund Allocation

The Fund Allocation tab displays the fund allocation breakdown for the plan.

Plan Details									
Members	Fund Allocation								
<table border="1"> <thead> <tr> <th colspan="2">Fund Allocation</th> </tr> <tr> <th>Fund Name</th> <th>Percentage</th> </tr> </thead> <tbody> <tr> <td></td> <td>0%</td> </tr> <tr> <td>ABC Pension Plan</td> <td>100%</td> </tr> </tbody> </table>		Fund Allocation		Fund Name	Percentage		0%	ABC Pension Plan	100%
Fund Allocation									
Fund Name	Percentage								
	0%								
ABC Pension Plan	100%								

Documents

The Documents tab display files uploaded for the specific plan and employer.

Plan Details					
Members	Documents				
<table border="1"> <thead> <tr> <th colspan="2">Documents</th> </tr> </thead> <tbody> <tr> <td colspan="2">No documents</td> </tr> </tbody> </table>		Documents		No documents	
Documents					
No documents					



The Bahamas

East Hill Street
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Phone: 242.603.6000
Fax: 242-326-3000

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3rd Floor, Fidelity Financial Centre
1 Gecko Link, George Town
Grand Cayman, KY1-1104
Cayman Islands
Phone: 345-746-6010
Fax: 345-949-6064

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27 Pine Road
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